
Subject: File Setup

Effective Date: July 1, 2010

Policy Statement:

Files need to be in uniform order

Procedure

In this order—ALL filed chronologically:

Page 1:

- Reapplication letter – may be culled when app returned
- PCP referral request – move to page 6 when returned
- Closures
- Transmittals from field offices – unless change of address
- Face Sheet
- SSI transmittal front sheet (if accepted)
- Insurance Information – except for denials
- Consent form
- Financial page of application
- Financial computation
- Financial documentation
- Legal guardianship
- Intakes

Page 2:

- Request for reports – cull when received
- SSI transmittal denials
- Reports in chronological order – including those from SSI;
 - if many on a page, put at latest date and stapled
- Bequest letters

Page 3:

- PCP provider form
- Authorizations
 - Mailed from this office
 - Temporary stickers on authorizations if billing needs
- Health Care Plans

Page 4:

- Bills – processed – in chronological order of date of service
- PKU order forms, paid
- Insurance denials

Page 5:

All services are limited to available CYSHCN funding and reimbursement rates.

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- Bills – pending and processing in chronological order of date of service
- PKU order forms
- Insurance riders

Page 6:

- Narratives
- DME quotes
- Correspondence, including old transmittals from field offices, in chronological order
- PCP provider requests – for mail person

ANYONE WORKING WITH A FILE AND FINDING THINGS MISPLACED OR NOT IN CHRONOLOGICAL ORDER SHOULD CORRECT THE ERROR